

Sales strategies overview: individual

1

Insurance need

All sales strategies start with a life insurance need, like protecting the value of a client's estate or enhancing the legacy that they can leave to future generations.

2

The client's goal

Each sales strategy can help clients achieve specific financial goals. Determining what these goals are will help you position the most appropriate strategy.

Transfer

- Minimize tax burden associated with taxable investments
- Satisfy insurance need without giving up liquidity within existing portfolio
- Enhance estate value for beneficiaries
- Diversify asset mix



Individual asset transfer strategy

Access

- Access assets to supplement future income, if needed
- Enhance estate value for beneficiaries
- Minimize tax burden associated with taxable investments



Individual retirement strategy

Protect

- Maximize estate value for beneficiaries
- Minimize tax burden associated with taxable investments
- Provide additional tax-preferred ways of increasing net worth



Individual investment strategy

3

Death benefit

The tax-free death benefit is paid directly to the client's estate or beneficiaries, enhancing their legacy and helping them achieve their financial goals.

We help. By providing a flexible and simple solution with growth potential.

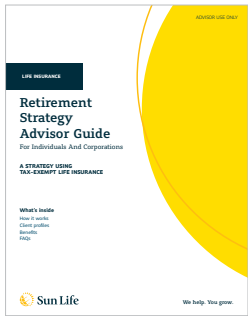


You grow. Through your commitment to meeting clients' changing needs.



Next steps

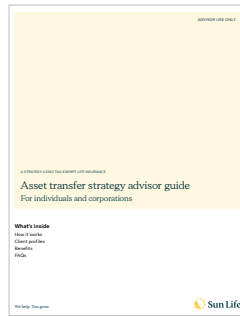
Advisor guides



810-4663

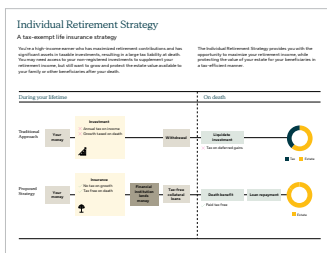


810-4665

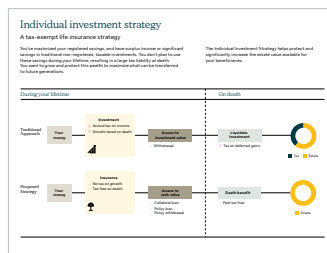


810-4667

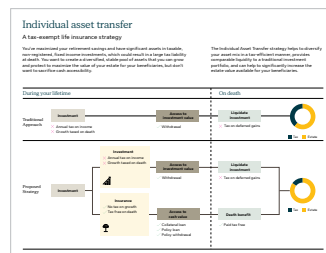
Sales strategies



810-4650



810-4652



810-4654

We help. You grow.

Sun Life Assurance Company of Canada is a member of the Sun Life group of companies.
© Sun Life Assurance Company of Canada, 2023. 810-4670-07-23

